

HR Checklist

For a smooth onboarding, it is important to complete all the actions below

- within 7 days upon offer acceptance
- save all the required documents in PDF format according to the file name¹
- click 'reply all' in our offer email, attach all the saved PDF documents

Get Started!

in given name family name format.

| Sn. | What we need... | How to complete... | Save the file name ¹ as... |
|-----|--|---|---------------------------------------|
| 1 | Acceptance of offer of employment | Return to us the entire contract as one PDF document. It is NOT mandatory to complete the start date section on the last page of the contract. Once you confirm your start date, send us the revised signed last page of the offer with the completed start date section. | |
| 2 | Personal data form | Login to "Welcome Portal" Goto: "Before your first day" Username: Indiawelcome_employee Password: Indiawelcome1 Complete personal data form electronically by typing directly in the file and save as PDF. Where signature is required, please print, sign, scan and send a clear PDF attachment. | |
| 3 | Confidentiality guidance note for new joiners | | |
| 4 | Declaration of Leave Encashment and Gratuity from past employment | | |
| 5 | Copy of academic certificates and result transcripts | | |
| 6 | Copy of professional certificates and result transcripts | Please provide a clear PDF attachment | |
| 7 | Marriage certificate (Not applicable for contractors and interns) | | |
| 8 | Spouse's ID / Spouse's passport | | |
| 9 | Child(ren)'s birth / adoption/ certificate(s) (Not applicable for contractors and interns) | | |
| 10 | Copy of residence proof | | |
| 11 | Latest statement on deferred compensation holdings / proof of deferred compensation forfeiture for final valuation | | |
| 12 | Scanned passport size photograph for identity card (JPG format) [Only for outside Mumbai or Pune] | To be sent by email to sh-mumbai-security@ubs.com | |

| Sn. | What we need... | How to complete... | Where to send.. |
|-----|--|--|---|
| 13 | PF Nomination Form (Form 2) | Original signed hard copies send to HR department, documents marked with an asterisk (*) submit no later than your start date. | Payroll Team – Human Resources Department UBS Business Solutions (India) Private Limited 5 th Floor, Bldg No.8, Commerzone, Yerwada, Samrat Ashok Path, Pune – 411006 Tel: 020 67421500 Note – Employees based in Pune Commerce Zone can hand over Original hard copies to the Payroll team (HR Department, 5 th Floor) |
| 14 | PF Declaration Form (Form 11) | | |
| 15 | Gratuity Nomination Form | | |
| 16 | ISS-1 Form (Optional) | | |
| 17 | Cancelled Cheque or Bank Statement of any of your active bank account (for PF documentation purpose) It need to reflect your name, bank account number & IFS code | | |
| 18 | Self-attested copy of PAN card | | |
| 19 | Self-attested copy of Aadhar card | | |



Need help?

1. How do I know what documents to submit before my start date?

Always refer to HR Checklist - This is your handy reference guide on what forms and documents we need you to complete and/or submit to HR. Follow the instructions in the checklist on how to complete each document.

- (a) Where indicated, please complete form **electronically**. You can do so by typing directly in the fillable PDF.

- (b) Some documents will require your wet signature. We ask you to print the document out and indicate your signature on the hardcopies before returning in scanned PDF file. The documents marked with an Asterisk (*) needs to be mailed hardcopies to the office address.

2. When should I submit all the documents?

Send us all the onboarding documents within the week you accept our employment offer. If you have any queries, contact recruiter or do 'reply all' upon our offer email and we will assist you.

Late submission delays the completion of checks and impacts your ability to undertake your day to day responsibilities including, if applicable, regulated activities.

3. I have submitted the documents but why do I still receive the reminder emails?

Our system is calibrated to detect documents by the file name and the format, always remember to **reply all** to the original email without changing the subject line.

We ask your documents must be saved in **PDF format** only. If your documents are in any other format, please convert them to PDF. This allows us to process them successfully. Each document needs to be saved **individually**. If required, please combine all the pages as one file per document. It is very important you name your document following our naming convention. This will help to facilitate a fast and efficient document collection process.

4. I have receive a mail delivery failure notifications when returning the documents

We can only process unzipped files in email sizing up to 5 MB. If your documents exceed 5MB simply send us multiple emails. And don't forget to always 'reply to all'.

You're almost done! Send us an email with all your completed onboarding documents.